

Article 25

This Article, brought by the School Committee, requests an appropriation of \$797,000 to be expended under the direction of the Permanent Building Committee (PBC), in collaboration with the School Committee and the School Building Committee. The appropriation is intended to fund the architectural, engineering and project management services and the Permanent Building Committee expenses necessary to advance the high school project design options and cost estimates for submission to the Massachusetts School Building Authority (MSBA). After the MSBA reviews the submission and determines the amount of state reimbursement the project will receive, the School Committee will return to a subsequent Town Meeting to request a full appropriation for the high school design and construction project.

The High School Project

The issues of the poor physical condition and inadequate size of Wellesley High School have been concerns of the School Committee for at least the past ten years. During the last five years, there have been four Town study committees and at least four substantial design or feasibility reports to evaluate the conditions of and review the options for the High School. Since 2002, Town Meeting has appropriated \$915,000 for these studies and reports. This has been a long and expensive process. However, given the scope and significance of the High School project it has been necessary and appropriate. The High School project will be the largest construction project the Town has ever undertaken – possibly more than five times larger than any other project.

Educational Program Design Review

Last year's Annual Town Meeting appropriated to the School Committee \$175,000 for an architectural programming study to continue review of the educational program and determine the facilities requirements needed to proceed to schematic design. The School Committee contracted with DeJong & Associates, an educational facilities consultant, to assist with the process. DeJong's assignment was to further focus both the community and the School Department on the educational vision, expected evolution of technology, curriculum requirements, departmental class room counts and adjacencies, and the space requirements for the auditorium, library, gymnasium and for performing and visual arts. At the same time DeJong was conducting their program vision and design review, the Moderator-appointed Program Review Committee (PRC) was participating in and evaluating the program design process. As a result of the study, Symmes, Maine & McKee Assoc (SMMA), architects under contract with the School Department and PBC, was asked to broadly sketch some options that would fit the educational program. PBC became involved as costs estimates were prepared for these options. Both DeJong and the PRC reported their

findings to the School Committee in late 2006 and their final reports will be issued by the 2007 Annual Town Meeting.

Role of Massachusetts School Building Authority

It was anticipated that the next steps in the High School project would follow a process of schematic design leading to design development and then to constructions bids. However, as various Town Boards and officials, including Town Counsel, have studied the 2004 Construction Reform legislation, Ch 149, §44 and Ch 70 B, it became clear that an important part of this process would be the role of the new Massachusetts School Building Authority (MSBA). (Web site at www.massschoolbuildings.org) The MSBA is a new entity created to provide construction funding for school building assistance and is substantially different from its predecessor the Massachusetts School Building Assistance Bureau. The MSBA was created in 2004. Initially, it addressed projects approved by the former authority, conducted a capital survey of all schools in the Commonwealth, and last fall issued final regulations for a grant application process. The new regulations set out a collaborative relationship between the MSBA and the local community. This collaborative approach to the planning and building of a school facility is a prerequisite to funding by the MSBA. In July 2006, the Town took the first step in this process and filed the required Statements of Interest for the High School project and for the Middle School renovation (available under the Board of Selectmen section of the Town website – www.wellesleyma.gov). The process outlined by the MSBA is lengthy and the exact procedures are still being established. However, working with the MSBA and following their new regulations is essential given that they could fund a grant of approximately 40% of the project costs. Under the prior school building authority, the awarding and the amount of a grant was generally not approved until the construction of the building was started or even completed. The MSBA has indicated that under its new procedures it will approve a grant much earlier in the process and provide funding as the construction progresses.

School Building Committee

As called for in the MSBA regulations, the Board of Selectmen has recently appointed a thirteen member School Building Committee (SBC) to monitor and advise throughout the process, working with the School Committee, the PBC and the MSBA. The SBC will pick up where the Program Review Committee leaves off, and continue through the various phases of the planning process set forth in the MSBA regulations. Although the MSBA will not accept completed grant applications until July 1, 2007, the Town needs to conform to the regulations as fully and as soon as possible to be favorably positioned for potential funding. There may also be an opportunity for the Town to be one of the initial pilot projects that will be used to develop the process and the procedures of the new authority.

Feasibility Study

This appropriation is for professional services to assist the PBC in coordinating and preparing the detail documentation, including preparing a Feasibility Study, necessary for the next step in the MSBA grant approval process. The entire process, as currently outlined by MSBA, has over 30 specific steps from the initial Statement of Interest through to the final Project Closeout. The Feasibility Study is a major milestone in this process. Fortunately, much of the documentation and studies that are required as part of the submission have already been accomplished by the various committees and consultants that have been working on the High School project over the past several years. It is anticipated that with the approval of this appropriation the work will be performed over the next six to nine months with the goal of completing the steps necessary to MSBA's satisfaction and have the Feasibility Study completed and available for submission to the MSBA this summer.

After the submission of the Feasibility Study the MSBA guidelines have a number of specific steps including; presenting preliminary plans and budget, MSBA Board approval, followed shortly by a Town vote, then final design, bidding and construction. However, the timetable and sequencing of these final steps are not entirely clear, and may need to be better explained by working with the MSBA.

Advisory Observations

Advisory recognizes the challenges, responsibilities and opportunities presented by what is likely to be the most expensive project in the history of the Town. The educational and financial implications will last for generations and the magnitude of the project requires that the Town maximize the opportunity for MSBA reimbursement. The appropriation sought under this Article is necessary to advance to the next step in that process. However, Advisory observes there are challenges going forward;

- It is possible there could be delays caused by waiting for MSBA action. The MSBA is a new entity and the regulations were issued only last fall. Many of the procedures have yet to be worked out and there are many questions about the process to be answered. The deadline for all applicants statewide to file Statements of Interest is not until July 31, 2007 and more than 150 have been filed so far. The School Committee has expressed concerns about how long the MSBA process might take, and while the Town has not yet been ready to proceed, there could be a delay waiting for MSBA. However, the potential reimbursement from MSBA of approximately 40% is so significant that it is financially prudent for the Town to wait for MSBA action.
- Various parties in the Town must collaborate on the High School project. The size and scope of this project, coupled with the new and complex role of the MSBA will require substantial coordinated effort between the PBC, School Committee, SBC and other Town boards, notably the Board of Selectmen. While the PBC and the School Committee have

worked well together on projects like Sprague School and the Middle School renovation, this is a much larger project. This project also has very substantial administrative responsibilities related to compliance and communication with MSBA. The role of the new SBC and other various Town boards will require a new level of communication and coordination. In addition, the elected and appointed members of these boards must remember to keep the Town's citizens apprised at each step of the project, particularly in light of the need for a Town wide vote to approve funding a High School project.

Advisory supports this appropriation as the next step necessary in the process of complying with MSBA's newly established regulations to request a grant for reimbursement of the project costs.

As part of reviewing the final dollar amount of the appropriation requested under this Article, Advisory concluded that because the project presents unique challenges a new approach to project management should be considered. Not only are the project's size and cost unprecedented in the Town, but the requirements of a high school building will be unique. In addition, the process of working with the MSBA authority and its recently promulgated regulations is a new one for the Town. In order to address these challenges it is important that the all the participants in this process consider new ways to manage and staff this project in order to address these challenges. What has worked well in the past for the Town's building projects may not be entirely appropriate for the considerable challenges that this project presents.

To address these concerns, Advisory has recommended that the School Department consider engaging additional dedicated resources to address academic and programmatic issues that may arise throughout the project. Likewise there may be a need for a senior level project manager with substantial high school construction experience to help the PBC and SBC in dealing with the MSBA, the architects, and even facilitate the voters understanding of the project. The project manager's role may require substantially more delegated authority to make decisions with a reporting function back to the PBC for oversight. While the PBC's very thorough and detailed style has been successful on previous building projects, a project of this magnitude in parallel with the substantial school infrastructure project under Article 23 and the DPW and MLP garages under Article 29 creates unprecedented circumstances where a different or modified approach merits serious consideration.

Advisory recommends favorable action, 10 to 0.